
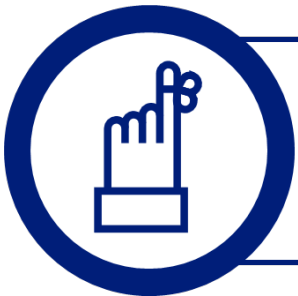


# Getting Started with Access<sup>®</sup> Online

# Webinar tips

- Please keep lines muted
- Full Screen =  button upper right of meeting room
- Exit full screen = ESC key
- Ask questions at any time
- Note – screens shown today are from our demonstration system (for training purposes only); your system views may vary



To ensure client confidentiality for all participants in this training, please do not share organization names (yours or others').



# Topics covered

By attending this course, you will be able to:

- ✓ Navigate Access Online
- ✓ View My Personal Information
- ✓ View account information and statements
- ✓ View cardholder processes
- ✓ View transactions
- ✓ Locate additional training and resources



# Login and basic navigation



# Access Online login screen

<https://www.access.usbank.com>

[Contact Us](#)

[Login](#)

## Welcome to Access Online!

Please enter the information below and login to begin.

\* = required

Organization Short Name:\*

User ID:\*

Password:\*

Login

[Forgot your password?](#)

[Register Online](#)

[Activate Your Card](#) | [Change Your PIN](#)

Type your Org Short Name: CASTP  
User ID and Password

Click the “Forgot your password?” link after **TWO** unsuccessful login attempts to reset your own password and avoid system lockout.

### Tips for using Access Online:

- Use internal navigation links instead of browser buttons
- Always allow pop-ups for statements, reports and more
- Logout will occur after 15 minutes of inactivity (with option to resume)

# Other possible login methods

## Login

### Authentication Question

Enter the response to your authentication question. If you need assistance, please contact your program administrator.

\* = required

**User ID:** jpstutz10

**Organization Short Name:** bpslm

**In what city or town did your mother and father meet? \***

**Continue**

**Authentication questions** are set up when a person first logs into Access Online and are used for:

- Additional security for Program Administrators
- Forgot your password process for password resets

# Enhanced Security Authentication

## Enhanced security

- Request a one-time passcode via text or email
- Use the “Remember this device” setting so you don’t have to use one-time passcode every time

## Login

### Enhanced Security Authentication

Please choose a method to verify your identity.

☒ **Text Passcode**

Mobile Number: \*\*\*\*\*1779

☐ **Email Passcode**

Email Address: jas\*\*\*\*\*@[REDACTED].com

You expressly consent to receiving text messages. Message and data rates may apply and you're responsible for any such charges.

[Continue](#)

[<< Back](#)

# Access Online Home screen



Chat With Us



Log Out

## Welcome to Access Online

- Request Status Queue
  - Active Work Queue
  - System Administration
  - Account Administration
  - Transaction Management
  - Account Information Reporting
  - Data Exchange
  - My Personal Information
- 
- Home
  - Contact Us
  - Training

### Message Center

[Message\(s\) from Access Online](#)

### Language Selection:

American English ▾

Access Online Message Center.

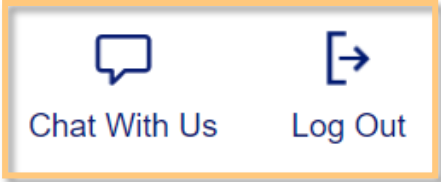
Access Online Language Selection area.

Left navigation menu.





# Access Online Home screen Cont.



- Request Status Queue
- Active Work Queue
- System Administration
- Account Administration
- Transaction Management
- Account Information
- Reporting
- Data Exchange
- My Personal Information

## Welcome to Access Online

### Message Center

[Message\(s\) from Access Online](#)

- Home
- Contact Us
- Training

Use the Links.

Use Resource center links.



# Access Online Resource center



- [Request Status Queue](#)
- [Active Work Queue](#)
- [System Administration](#)
- [Account Administration](#)
- [Transaction Management](#)
- [Account Information](#)
- [Reporting](#)
- [Data Exchange](#)
- [My Personal Information](#)

## Welcome to Access Online

### Message Center

[Message\(s\) from Access Online](#)

- [Home](#)
- [Contact Us](#)
- [Training](#)

View the announcements and How-to-guides

Resource center

Announcements 1 >

How-to guides >  
Quick tips



# Managing personal information

# My Personal Information

Request Status Queue  
Active Work Queue  
System Administration  
Account Administration  
Transaction Management  
Account Information  
Reporting  
Data Exchange  
My Personal Information

Home

Contact Us

Training

## My Personal Information

User ID:

### Login Information

Change your system password and create or modify an authentication response that will be used when resetting a password.

- [Enhanced Security Preferences](#)

### Contact Information

Update your user ID contact information (name, address, phone no., etc.).

- [Email Notification](#)

### Manage Account Access

View access rights and user specific information, such as accounts and hierarchy level access.

- [Add Accounts](#)

### Manage Accounting Code Favorites

Add favorites, enable favorites to be selected when reallocating and managing allocations, and delete existing favorites.

### Account Alerts

Enroll, view, or update your Alert preferences.

Click **Login Information** to change your password or update authentication questions/responses.

Click **Contact Information** to view/update user Id information.

# My Personal Information page with Email Notification link

- Request Status Queue
- Active Work Queue
- System Administration
- Account Administration
- Event Driven Notification
- Order Management
- Transaction Management
- Account Information
- Reporting
- Data Exchange
- My Personal Information**
  - Login Information
  - Contact Information
  - Backup for Manager Approval Queue
  - Manage Account Access
  - Manage Favorites
  - Account Alerts
- Home
- Email Center
- Contact Us
- Training
- Government Services

## My Personal Information

User ID: PA1AGENCY

### Login Information

Change your system password and create or modify an authentication response that will be used when resetting a password.

- [Enhanced Security Preferences](#)

### Contact Information

Update your user ID contact information (name, address, phone no., etc.).

- 1
- [Email Notification](#)

### Backup for Manager Approval Queue

Select who should approve transactions in your Manager Approval Queue when you're unavailable.

### Manage Account Access

View access rights and user specific information, such as accounts and hierarchy level access.

- [Add Accounts](#)

### Manage Accounting Code Favorites

Add favorites, enable favorites to be selected when reallocating and managing allocations, and delete existing favorites.

### Account Alerts

Enroll, view, or update your Alert preferences.

A/OPCs can set up email notifications for other users in a user profile –  
System Administration > User Profiles

1

A/OPCs



2

Approving/  
Billing Officials



3

Cardholders



# Email notifications, part 1

- Request Status Queue
- Active Work Queue
- System Administration
- Account Administration
- Event Driven Notification
- Order Management
- Transaction Management
- Account Information
- Reporting
- Data Exchange
- My Personal Information**
  - Login Information
  - Contact Information
  - Backup for Manager Approval Queue
  - Manage Account Access
  - Manage Favorites
  - Account Alerts

- Home
- Email Center
- Contact Us
- Training
- Government Services

## My Personal Information Email Notification


User ID: PA1AGENCY

To receive an email notification, select the specific process and corresponding scenarios, timing or accounts.


\* = required

Email Address: \*

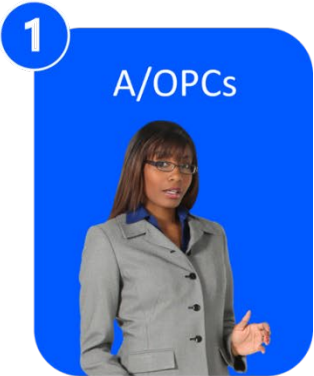
A.ADAMS@ACME.GOV

Preferred Output Language: \* American English 

### 1 Status Notifications

- 2 ☐ **Data Exchange** 
- ☐ All
  - ☐ Successful Upload
  - ☐ Unsuccessful Upload
  - ☐ Successful Download
  - ☐ Unsuccessful Download

- 3 ☐ **Dispute Status Email Notification**
- Send notification when the status of my dispute changes.





# Email notifications, part 3

☒ **Password Expiration Email Notification**  
Send notification 10 days and 3 days prior to password expiration.

3 ☐ **Pending Cardholder's Transaction Approval**  
☒ Daily  
☐ Weekly:

2 ☐ **Pending Approver's Transaction Approval**  
☒ Daily  
☐ Weekly:

1 ☒ **Effective Date Maintenance Notification** ⓘ  
☒ Send notification when a Merchant Authorization Control (MAC) effective date request fails.  
☒ Send notification when other types of effective date requests fail (excluding MAC).

**Payment Plus Email Notification** ⓘ

☐ **Payment Requests**  
☒ Daily  
☐ Weekly:

Sent notifications to the specific user when:

- ☐ Final Approved - Requestor will receive notification when Final Approved.
- ☐ Rejected - If rejected to you, you will receive notification.
- ☐ Declined - If declined to you, you will receive notification.
- ☐ Send Pending Approval notifications
  - ☐ Send notification only when there are requests pending approval in my Manager Approval Queue.
  - ☐ Send notification whether or not there are requests pending approval in my Manager Approval Queue.

3 ☒ **Rejected Transaction Email Notification** ⓘ  
☒ Send rejected transaction notifications.



# Email notifications, part 4 – statement notification

## Account Notifications

Select accounts below to receive email notification when a statement is available in Access Online.

### User ID Accounts

Account Number	Account Name	Account Type	Statement
----------------	--------------	--------------	-----------

#### Viewed Accounts (Through Assigned Hierarchies)

[Add Managing Accounts](#) | [Add Cardholder Account](#)

Account Number	Account Name	Account Type	Statement	Action
**1477	JUDY BAHAR	Cardholder	<input checked="" type="checkbox"/>	<a href="#">Remove</a>

Save

[<< Back to Personal Information](#)

1

A/OPCs



2

Approving/  
Billing Officials



3

Cardholders



# My Personal Information cont.

[Request Status Queue](#)  
[Active Work Queue](#)  
[System Administration](#)  
[Account Administration](#)  
[Transaction Management](#)  
[Account Information](#)  
[Reporting](#)  
[Data Exchange](#)  
[My Personal Information](#)

[Home](#)

[Contact Us](#)

[Training](#)

## My Personal Information

User ID:

### [Login Information](#)

Change your system password and create or modify an authentication response that will be used when resetting a password.

- [Enhanced Security Preferences](#)

### [Contact Information](#)

Update your user ID contact information (name, address, phone no., etc.).

- [Email Notification](#)

### [Manage Account Access](#)

View access rights and user specific information, such as accounts and hierarchy level access.

- [Add Accounts](#)

### [Manage Accounting Code Favorites](#)

Add favorites, enable favorites to be selected when reallocating and managing allocations, and delete existing favorites.

### [Account Alerts](#)

Enroll, view, or update your Alert preferences.

Click on Manage Account Access to view the user access rights (FEG, hierarchies, account assignments).

# Viewing cardholder account information

# Account information on the main menu



Chat With Us



Log Out

## Welcome to Access Online

- Request Status Queue
- Active Work Queue
- System Administration
- Account Administration
- Transaction Management
- Account Information**
- Reporting
- Data Exchange
- My Personal Information

Go to Account Information.

### Message Center

Message(s) from Access Online

### Language Selection:

American English ▾

Home

Contact Us

Training



# Account statements or profiles

- Request Status Queue
- Active Work Queue
- System Administration
- Account Administration
- Event Driven Notification
- Order Management
- Transaction Management
- Account Information**
  - Statement
  - Account Profile
- Reporting
- Data Exchange
- My Personal Information

- 
- Home
  - Email Center
  - Contact Us
  - Training
  - Government Services

## Account Information

### Statement

View account statement(s).

- [Cardholder Account Statement](#)
- [Managing Account Statement](#)
- [Diversion Account Statement](#)

Go to **Cardholder Account Statement** to view the statements.

### Account Profile

View account demographics, limits, accounting code, and other related information.

- [Cardholder Account Profile](#)
- [Managing Account Profile](#)
- [Diversion Account Profile](#)



Cardholder  
account  
statement search  
screen

# Cardholder Account Statement

## Search & Select an Account

[View Diversion Account](#) | [View Managing Account](#)

### Cardholder Account Search

Search for an account by Cardholder Account Number, Account Unique ID, Name, or Social Security Number. You can also find a cardholder account by first [Searching for a Managing Account](#).

Account Number (Last 4):

Account Unique ID: ⓘ

OR

Last Name (or Vehicle Name):

OR

First Name:

Social Security Number:

OR

Search

Use the boxes to help narrow down your search or use the Wild Card Pull.

# Search and select an account

## Cardholder Account Search

Search for an account by Cardholder Account Number, Account Unique ID, Name, or Social Security Number. You can also find a cardholder account by first [Searching for a Managing Account](#).

Account Number (Last 4):

Account Unique ID: [i](#)

OR

Last Name:

First Name:

OR  %

Social Security Number:

OR

Search

Records 1 - 14 of 14

Product Name	Cardholder Name	Account Number	Account Unique ID	Account Status	Status Description
<a href="#">Purchasing</a>	JUDY BAHAR	*****1477	0305-9170-1227-3840	-OPEN	
<a href="#">Purchasing</a>	ANTONIO CAMINO	*****5090	0305-9172-4592-5871	-OPEN	
<a href="#">Purchasing</a>	KATHLEEN COFFEY	*****1485	0305-9170-1297-6001	-OPEN	
<a href="#">Purchasing</a>	EAMON DOUGHERTY	*****5108	0305-9172-4571-9335	-OPEN	

Click the blue, underlined link to select the account to view.

# Statements screen

## Account Statements

MEGAN A ACKERMAN

Account Unique ID: 0142-5162-8055-0062 ⓘ

Account ID: 1722-4561-9012 | Account Number: \*\*4561

Please Note: The statement can't be used for remittance of payment, it's for display purposes only.

[View account profile](#)

2023

[04/10/2023 \(PDF\)](#)

2022

[11/10/2022 \(PDF\)](#)

[10/10/2022 \(PDF\)](#)

[09/12/2022 \(PDF\)](#)

[06/10/2022 \(PDF\)](#)

2021

[11/10/2021 \(PDF\)](#)

Your statement will populate as a PDF allowing you to save.

Click the link of the statement you wish to view.

**usbank.**

U.S. BANCORP SERVICE CENTER  
P. O. Box 6343  
Fargo, ND 58125-6343

TEST-ACME DEMO PCARD

ACCOUNT NUMBER  
STATEMENT DATE 04-10-23  
TOTAL ACTIVITY \$ .00

"MEMO STATEMENT ONLY"  
DO NOT REMIT PAYMENT

000009296 01 SP 106481709162682 S  
MEGAN A ACKERMAN  
ACQ DEMO TEST  
200 S 6TH STREET  
EP-MN-L28C  
MINNEAPOLIS MN 55402-1403

200

NEW ACCOUNT ACTIVITY					
POST DATE	TRAN DATE	TRANSACTION DESCRIPTION	REFERENCE NUMBER	MCC	AMOUNT
03-16	03-07	PEPPERMILL HOTEL BLAT DALLAS TX	74798263075075000002516	3796	662.60 CR
03-16	03-07	PEPPERMILL HOTEL BLAT DALLAS TX	74798263075075000000791	3796	662.60

Default Accounting Code: 123430223144444-HMRE9321

CUSTOMER SERVICE CALL 800-344-5696	ACCOUNT NUMBER		ACCOUNT SUMMARY	
	STATEMENT DATE	DISPUTED AMOUNT	PREVIOUS BALANCE	
SEND BILLING INQUIRIES TO: C/O U.S. BANCORP SERVICE CENTER, INC. U.S. BANK NATIONAL ASSOCIATION P.O. BOX 6335 FARGO, ND 58125-6335	04-10-23	\$ .00	PURCHASES & OTHER CHARGES	\$662.60
	AMOUNT DUE \$ 0.00		CASH ADVANCES	\$ .00
	DO NOT REMIT		CASH ADVANCE FEE	\$ .00
			CREDITS	\$662.60
			TOTAL ACTIVITY	\$0.00

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# Cardholder account profile main page

Request Status Queue  
Active Work Queue  
System Administration  
Account Administration  
Event Driven Notification  
Order Management  
Transaction Management  
**Account Information**

- Statement
- Account Profile

Reporting  
Data Exchange  
My Personal Information

---

Home

Email Center

Contact Us

Training

Government Services

## Account Information

### Statement

View account statement(s).

- [Cardholder Account Statement](#)
- [Managing Account Statement](#)
- [Diversion Account Statement](#)

### Account Profile

View account demographics, limits, accounting code, and other related information.

- [Cardholder Account Profile](#)
- [Managing Account Profile](#)
- [Diversion Account Profile](#)

# Cardholders' account profile link

## Cardholder Account Profile

### Cardholder Account Summary

Card Account Number: \*\*\*\*\*1477, JUDY BAHAR  
Card Account ID: 002714774009

[Switch Accounts](#)

Select an item below to view its contents. You can also [View a Managing Account](#)

[View Account Profile](#)

View account information such as Account Owner Details, Account Details, Default Accounting Code, Authorization Limits.

[Account Authorizations](#)

View Account Authorization information such as Request Type, Request Source, MCC, and Transaction Amount.

# Cardholders' account profile

JUDY BAHAR

Product

Purchasing

Account

Unique ID: 0305-9170-1227-3840 ⓘ

ID: 0027-1477-4009

Number: \*\*1477

Processing Hierarchy ⓘ

[Show All Hierarchy Names](#)

3059-0073-64990-00000-0000

Managing Account

Name: ACME AGENCY 2

Unique ID: 0305-9170-1281-4080 ⓘ

ID: 5555-4998-4009

Number: \*\*4998

Organization Name (optional) ⓘ

DEMO AGENCY

Optional 1 (optional)

--

Third Line Embossing (optional)

--

Account Overview

Summary ⓘ

Account Status

Open

Credit Limit

\$3000

Available Credit

\$3000

Payment Information ⓘ

Statement Balance

--

Current Balance

\$0.00

[View Statements](#)



# Account Information/Profile

- Request Status Queue
  - Active Work Queue
  - System Administration
  - Account Administration
  - Event Driven Notification
  - Order Management
  - Transaction Management
  - Account Information**
    - Statement
    - **Account Profile**
  - Reporting
  - Data Exchange
  - My Personal Information
- 
- Home
  - Email Center
  - Contact Us
  - Training
  - Government Services

## Cardholder Account Profile

### Cardholder Account Summary

**Card Account Number:** \*\*\*\*\*5683, ROSEANNE BUTLER  
**Card Account ID:** 059056833033

[Switch Accounts](#)

Select an item below to view its contents. You can also [View a Managing Account](#)

#### [View Account Profile](#)

View account information such as Account Details, Default Accounting Code, Authorization Limits.

Click Account Authorizations

#### [Account Authorizations](#)

View Account Authorization information such as Request Type, Request Source, MCC, and Transaction Amount.

# View a message if there are no transactions

Request Status Queue  
Active Work Queue  
System Administration  
Account Administration  
Event Driven Notification  
Order Management  
Transaction Management  
**Account Information**  
• Statement  
• Account Profile  
Reporting  
Data Exchange  
My Personal Information

## Cardholder Account Profile

### Cardholder Account Summary

Card Account Number: \*\*\*\*\*5683, ROSEANNE BUTLER  
Card Account ID: 059056833033

[Switch Accounts](#)

**i There are no authorizations for this account.**

No transactions occurred  
within last 72 hours

Select an item below to view its contents. You can also [View a Managing Account](#)

#### [View Account Profile](#)

View account information such as Account Owner Details, Account Details, Default Accounting Code, Authorization Limits.

#### [Account Authorizations](#)

View Account Authorization information such as Request Type, Request Source, MCC, and Transaction Amount.

Home  
Email Center  
Contact Us  
Training  
Government Services

# View the authorization table if there are transactions – 72 hours

- Request Status Queue
- Active Work Queue
- System Administration
- Account Administration
- Event Driven Notification
- Order Management
- Transaction Management
- Account Information
  - Statement
  - Account Profile
- Reporting
- Data Exchange
- My Personal Information

- Home
- Email Center
- Contact Us
- Training
- Government Services

## Cardholder Account Profile

### Account Authorizations

Card Account Number: \*\*\*\*\*5683, RO:  
Card Account ID: 059056833033

Check for page numbers

[Switch Accounts](#)

Name:  
Records 1 - 2 of 2

<u>Auth Date</u>	<u>Auth Time</u>	<u>Response</u>	<u>Auth Number</u>	<u>Type of Request</u>	<u>Transaction Amount</u>	<u>MCC</u>	<u>MCC Description</u>
03/11/2022	<a href="#">09:04 PM ET</a>	Not Decline	005014	Purchase	\$0.00	5599	MISCELLANEOUS AUTOMOTIVE
03/11/2022	<a href="#">07:38 PM ET</a>	Approved	068575	Mail/Phone Order	\$169.75	5964	CATALOG MERCHANT
03/11/2022	<a href="#">06:22 PM ET</a>	Approved	089787	Mail/Phone Order	\$99.18	5599	MISCELLANEOUS AUTOMOTIVE
03/11/2022	<a href="#">03:18 PM ET</a>	Approved	021145	Mail/Phone Order	\$150.69	5599	MISCELLANEOUS AUTOMOTIVE
03/13/2022	<a href="#">11:05 PM ET</a>	Do not honor		Mail/Phone Order	\$1,072.80	5599	MISCELLANEOUS AUTOMOTIVE

[<< Back to Cardholder Account Summary](#)

# Responses and descriptions

Not Decline - the transaction was run for \$0.  
A transaction needs to be greater than \$0.

Approved - the transaction successfully  
posted to the account.

Name:  
Records 1 - 2 of 2

<u>Auth Date</u>	<u>Auth Time</u>	<u>Response</u>	<u>Auth Number</u>	<u>Type of Request</u>	<u>Transaction Amount</u>	<u>MCC</u>	<u>MCC Description</u>
03/11/2022	<a href="#">09:04 PM ET</a>	Not Decline	005014	Purchase	\$0.00	5599	MISCELLANEOUS AUTOMOTIVE
03/11/2022	<a href="#">07:38 PM ET</a>	Approved	068575	Mail/Phone Order	\$169.75	5964	CATALOG MERCHANT
03/11/2022	<a href="#">06:22 PM ET</a>	Approved	089787	Mail/Phone Order	\$99.18	5599	MISCELLANEOUS AUTOMOTIVE
03/11/2022	<a href="#">03:18 PM ET</a>	Approved	021145	Mail/Phone Order	\$150.69	5599	MISCELLANEOUS AUTOMOTIVE
03/13/2022	<a href="#">11:05 PM ET</a>	Do not honor		Mail/Phone Order	\$1,072.80	5599	MISCELLANEOUS AUTOMOTIVE

Do not honor - the transaction declined.

Declined (not pictured) - the transaction declined.

# Click the Auth Time for more details

- Request Status Queue
- Active Work Queue
- System Administration
- Account Administration
- Event Driven Notification
- Order Management
- Transaction Management
- Account Information
  - Statement
  - Account Profile
- Reporting
- Data Exchange
- My Personal Information

- Home
- Email Center
- Contact Us
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- Government Services

## Cardholder Account Profile

### Account Authorizations

**Card Account Number:** \*\*\*\*\*5683, ROSEANNE BUTLER  
**Card Account ID:** 059056833033

[Switch Accounts](#)

**Name:**  
Records 1 - 2 of 2

<u>Auth Date</u>	<u>Auth Time</u>	<u>Response</u>	Auth Number	<u>Type of Request</u>	Transaction Amount	<u>MCC</u>	<u>MCC Description</u>
03/11/2022	<a href="#">09:04 PM ET</a>	Not Decline	005014	Purchase	\$0.00	5599	MISCELLANEOUS AUTOMOTIVE
03/11/2022	<a href="#">07:38 PM ET</a>	Approved	068575	Mail/Phone Order	\$169.75	5964	CATALOG MERCHANT
03/11/2022	<a href="#">06:22 PM ET</a>	Approved	089787	Mail/Phone Order	\$99.18	5599	MISCELLANEOUS AUTOMOTIVE
03/11/2022	<a href="#">03:18 PM ET</a>	Approved	021145	Mail/Phone Order	\$150.69	5599	MISCELLANEOUS AUTOMOTIVE
03/13/2022	<a href="#">11:05 PM ET</a>	Do not honor		Mail/Phone Order	\$1,072.80	5599	MISCELLANEOUS AUTOMOTIVE

[<< Back to Cardholder Account Summary](#)

Click the time stamp for the declined transaction

# Review decline information

## Cardholder Account Profile Account Authorizations

Card Account Number: \*\*\*\*\*5683, ROSEANNE BUTLER [Switch Accounts](#)

View the *Decline* tab.

Auth Date: 03/13/2022 Auth Number: MCC: 5599  
Auth Time: 11:05 PM ET Type of Request: Mail/Phone Order MCC Description: MISCELLANEOUS AUTOMOTIVE  
Response: Do not honor Transaction Amount: \$1,072.80

[Decline](#) [Account](#) [Merchant](#) [Parent](#) [Diversion](#) [Process](#)

Decline Reason: 0048 - 0048 Not enough available money  
Decline Level: Individual  
Velocity Type: Not Declined for Velocity

Find the decline reason.

[<< Back to Account Authorizations](#)



# Corporate versus individual decline

Decline

Account

Merchant

Parent

Diversion

Process

Decline Reason: 0048 - 0048 Not enough available money

Decline Level: Individual

Velocity Type: Not Declined for Velocity

Individual means the transaction declined at the cardholder level

Corporate means the transaction declined because of the managing account level

Decline

Account

Merchant

Parent

Diversion

Process

Decline Reason: 0048 - 0048 Not enough available money

Decline Level: Corporate

Velocity Type: Not Declined for Velocity

# View Cardholder processes

# Card account activation

There are two options to activate a card:

- Click the link on the Access Online login page  
(Google search for Access Online)
- Call the phone number on the back of the card  
(1-800-344-5696)



# Online card activation

[Contact Us](#)

[Login](#)

## Welcome to Access Online!

Please enter the information below and login to begin.

\* = required

**Organization Short Name:\***

**User ID:\***

**Password:\***

Login

[Forgot your password?](#)

[Register Online](#)

[Activate Your Card](#)

[Change Your PIN](#)

### Information needed:

- 16-digit account number
- Expiration date
- Last four digits of the work phone number on your card account

Click Activate Card

# Activate Your Card-Information page



## Activate Your Card - Information

### Enter Card Information

Complete the fields below to activate your card.

All fields required unless noted as *(optional)*.

Card Number

Expiration Date

Month ▼

Year ▼

Work Phone

Last 4 digits

Input the card  
information to  
activate the card.

Cancel

Submit



# Personal Identification Number

## What is a PIN?

- When you activate your card, select a 4-digit PIN
- A PIN may be required by some merchant terminals or for some transaction types, such as cash advances
- Many transactions outside of the United States require a 4-digit PIN
- Change your PIN on the Access Online Home page or through the IVR
- To set up a PIN if you don't set it up upon activation, you will need to call customer service for a PIN Mailer to get it set up.
- A Program Administrator may go to Account Administration, Cardholder Account Maintenance, Account Details and click a link to Request PIN to have a PIN Mailer sent for a card. This link only displays if there is no PIN on the card.



# Caller verification - Cardholders

- Call Card Member Services at 1-800-344-5696
- The Customer Service Representative will ask for first and last name and 16-digit account number as well as three of the below pieces of information to verify identity.
  - Full address, as it appears on the account.
  - Home or business phone number.
  - Employee ID
  - Last four digits of SSN (or 4-digit Activation Code).
  - Date of Birth
  - Credit Limit
  - Single Purchase Limit
- If the cardholder is unable to verify three pieces of information from this list, they will be referred to their Program Administrator to ensure their personal data is reviewed and updated within their organization.






A woman with dark hair, wearing a light pink top, is sitting on a couch. She is holding a black smartphone in her left hand and has her right hand raised to her face with an open mouth and wide eyes, indicating a state of shock or panic. The background shows a bookshelf filled with books and a green plant on the left.


**Situation: Card is missing. Possibly stolen.**


**Call Cardmember Services**

- **United States 1-800-344-5696**

# Log into Access Online and navigate to Contact Us

 Access<sup>®</sup> Online

 Chat With Us

 Log Out

---

Request Status Queue

Active Work Queue

System Administration

Account Administration

Transaction Management

Account Information Reporting

Data Exchange

My Personal Information

## Welcome to Access Online

### Message Center

[Message\(s\) from Access Online](#)

Home


Contact Us

Training

Language Selection:

American English ▾

Select Contact Us



# Log into Access Online and navigate to Contact Us

The screenshot displays the usbank Access Online interface. At the top left is the usbank logo, followed by the text "Access Online". On the top right, there are two links: "Chat With Us" with a speech bubble icon and "Log Out" with an exit icon. On the left side, there is a vertical menu with the following items: "Request Status Queue", "Active Work Queue", "System Administration", "Account Administration", "Transaction Management", "Account Information", "Reporting", "Data Exchange", and "My Personal Information". Below this menu are three main navigation links: "Home", "Contact Us" (which is highlighted with a yellow box and a line pointing to the modal), and "Training". The "Contact Us" modal is open in the center, titled "Contact Us". It contains several sections: "Cardholder Account Support" (Lost or stolen cards, PINS, telepay.) with "United States" contact info (800.344.5696 (Toll Free), 701.461.2010); "Access Online Technical Help Desk" with "U.S. Cardholder" (877.887.9260 (Toll Free), 701.461.2028) and "U.S. Program Administrator" (877.452.8083 (Toll Free), 701.461.2900) contact info; "U.S. Email" (accessonlinesupport@usbank.com); and "Dispute Fax Number & Address" with "U.S. Dispute Fax" (866.229.9625 (Toll Free)) and "U.S. Dispute Address" (Cardmember Service, P.O. Box 6335, Fargo, ND 58125-6335). A blue "Close" button is at the bottom right of the modal. A blue callout box with an arrow points to the "United States" phone number, containing the text "Use the phone number for Custom Service." In the bottom right corner, there is a red circle with the number "1" and a circular help icon with a question mark.

usbank Access Online

Chat With Us Log Out

Request Status Queue  
Active Work Queue  
System Administration  
Account Administration  
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**Contact Us**  
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**Welcor**

**Message**  
[Message\(s\)](#)

**Contact Us**

Cardholder Account Support  
Lost or stolen cards, PINS, telepay.

**United States**  
800.344.5696 (Toll Free)  
701.461.2010

Access Online Technical Help Desk

**U.S. Cardholder**  
877.887.9260 (Toll Free)  
701.461.2028

**U.S. Program Administrator**  
877.452.8083 (Toll Free)  
701.461.2900

**U.S. Email**  
accessonlinesupport@usbank.com

Dispute Fax Number & Address

**U.S. Dispute Fax**  
866.229.9625 (Toll Free)

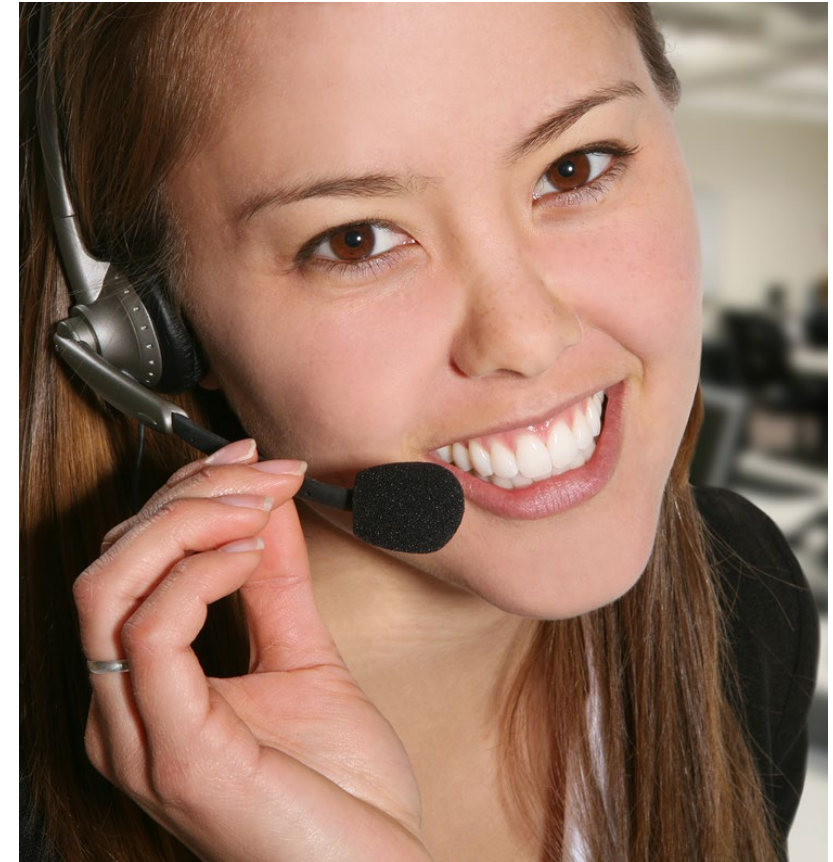
**U.S. Dispute Address**  
Cardmember Service  
P.O. Box 6335  
Fargo, ND 58125-6335

Close

Use the phone number for Custom Service.

# Fraudulent transactions identified

- When you call to notify the bank that your card has been lost or stolen, the representative reviews your transactions with you. (Notify the bank within **90 days of transaction posting** date.)
- If one or more transactions are identified as fraudulent, a Case Processor is assigned for processing.



# Next steps

The bank case processor sends a **statement of fraud**:

1. Via U.S. Postal Service to the address that appears in the *Account Owners* area of your card account profile.
2. If requested during the initial contact, we can use the email address on file.
3. The statement of fraud **must** be *signed and returned* to the bank by the cardholder within **21 days** from the date it was generated.
  - You can complete the form and send it back by email. If you received it by email, just reply to the original email and attach the completed form.
  - If it is not returned within 21 days, the fraud case will not get processed and paid.
  - An investigator may be assigned to a case to work with Law Enforcement if needed.



Important!



# Sample Statement of Fraud

## CARDMEMBER SERVICE

P.O. Box 6335  
Fargo, ND 58125-6335

[\*LONG DATE] Case Number: [\*CASE ID]

[\*CARDHOLDER NAME]  
[\*SECONDARY CARDHOLDER]  
[\*CARDHOLDER ADDRESS 1]  
[\*CARDHOLDER ADDRESS 2]  
[\*CARDHOLDER CITY] [\*CARDHOLDER STATE] [\*CARDHOLDER ZIP CODE]

Account Number Ending With: [\*ACCOUNT LAST FOUR]

Dear [\*CARDHOLDER NAME]:

Please sign and return these two (2) Statement of Fraud forms to the above address by [\*RETURN DATE]. We have enclosed a return envelope for your convenience.

I, do hereby certify, state and declare under penalty of perjury that the following statement(s) is/are true: (Place an X by the applicable information)

☐ I am claiming that my Credit Cards were Lost/Stolen.  
☐ I am claiming that my Credit Cards were never received.  
☐ I am claiming that I have any Credit Cards in my possession and there are Unauthorized Transaction(s) on my Account.  
☐ I am claiming that this account was opened fraudulently. I did not apply for the above referenced account number. I have received no benefit in regard to this account #. I have no knowledge of this account, nor know of any person(s) involved in the obtaining, receiving or signing of this application.

If possible provide the following information:

Lost/Stolen Date \_\_\_\_\_ • Date Card Last Used: \_\_\_\_\_

Suspect's Name \_\_\_\_\_

Are any other cards or Identification items missing/stolen? Y/N \_\_\_\_\_ Please list items: \_\_\_\_\_

Police report filed? Y/N \_\_\_\_\_ If Yes: Case # \_\_\_\_\_ Date Filed: \_\_\_\_\_

Police Dept: \_\_\_\_\_ Phone Number: \_\_\_\_\_ Investigation Officer: \_\_\_\_\_

I never received a Debit/Credit Card in the mail. Y/N \_\_\_\_\_

Card is in my possession Y/N \_\_\_\_\_

I hereby state that I neither personally authorized nor gave authority to participate in the list of attached transactions. The last time I/we used the card(s) was on \_\_\_\_\_.

Please provide us with additional information relating to this claim regarding person(s) that may have been suspect. If additional room is needed you may continue on the attached page:

Please read and complete the following information.

I/We understand that all alleged fraudulent or unauthorized card usage will be investigated and that such may be referred to the appropriate law enforcement agency. I/We also agree to cooperate in the investigation of our case and any prosecution of individual(s) charged with fraudulent or unauthorized card usage.

I understand that my failure to supply written notification that may only be obtained from me to facilitate the investigation may result in the reversal of the temporary provisional credit. Please be aware that completing the requested documentation will assist us in our ability to investigate this claim.

Primary Cardholder Signature \_\_\_\_\_ Date \_\_\_\_\_

Secondary Cardholder Signature \_\_\_\_\_ Date \_\_\_\_\_

CARDS: [\*ACCOUNT NUMBER]

If you have any questions concerning your account, please contact us at [\*BDN TELEPHONE] fax: [\*BDN FAX]. Fraud Prevention Representatives are available 24-hours a day, 7 days a week.

Sincerely,

[\*REP NAME]  
Cardmember Service Representative  
Direct [\*REP PHONE NUMBER]  
Toll Free [\*BDN TELEPHONE] EXT. [\*REP PHONE EXTENSION]  
Fax [\*BDN FAX]

Please review the charges listed on the transaction report carefully. If the list of transactions includes any that you authorized, or initiated, please indicate that by circling the transaction(s) and placing your initials next to them. Circling and initialing a transaction will result in the provisional credit associated with that transaction being reversed.

## STATEMENT OF FRAUD

I, [\*CARDHOLDER NAME], did not use my [\*CARD TYPE], account number [\*ACCOUNT NUMBER] to make the below transaction(s), nor did I give anyone permission to use my name or account number to make the purchase(s).

[\*LIST FRAUD CHG1]

[\*LIST FRAUD CHG2]

[\*LIST FRAUD CHG3]

[\*LIST FRAUD CHG4]

[\*LIST FRAUD CHG5]

[\*LIST FRAUD CHG6]

[\*LIST FRAUD CHG7]

[\*LIST FRAUD CHG8]

[\*LIST FRAUD CHG9]

[\*LIST FRAUD CHG10]

[\*LIST FRAUD CHG11]

[\*LIST FRAUD CHG12]

[\*LIST FRAUD CHG13]

[\*LIST FRAUD CHG14]

[\*LIST FRAUD CHG15]

[\*LIST FRAUD CHG16]

[\*LIST FRAUD CHG17]

CARDHOLDER SIGNATURE \_\_\_\_\_

[\*REP NAME]  
Cardmember Service Representative  
Direct [\*REP PHONE NUMBER]  
Toll Free [\*BDN TELEPHONE] EXT. [\*REP PHONE EXTENSION]  
Fax [\*BDN FAX]

Cardmember Service P.O. Box 6335, Fargo, ND 58125-6335.

# Get an update on a fraud claim

If you need an update on a fraud claim, call the bank Fraud Department at **1-800-523-9078 for fraud detection** or **1-800-815-1405 for claims support.**

Optionally, you can call the case processor directly using the contact information provided to you in a letter or email.





# Set up Account Alerts



  
Chat With Us

  
Log Out

Request Status Queue  
Active Work Queue  
System Administration  
Account Administration  
Transaction Management  
Account Information  
Reporting  
Data Exchange  
**My Personal Information**

## Welcome to Access Online

Go to the link for **My Personal Information**.

Message

Message(s) from Access Online

### Language Selection:

American English ▾

Home

Contact Us

Training



# Account Alerts

[Request Status Queue](#)  
[Active Work Queue](#)  
[System Administration](#)  
[Account Administration](#)  
[Transaction Management](#)  
[Account Information](#)  
[Reporting](#)  
[Data Exchange](#)  
[My Personal Information](#)

[Home](#)

[Contact Us](#)

[Training](#)

## My Personal Information

User ID:

### Login Information

Change your system password and create or modify an authentication response that will be used when resetting a password.

- [Enhanced Security Preferences](#)

### Contact Information

Update your user ID contact information (name, address, phone no., etc.).

- [Email Notification](#)

### Manage Account Access

View access rights and user specific information, such as accounts and hierarchy level access.

- [Add Accounts](#)

### Manage Accounting Code Favorites

Add favorites, enable favorites to be selected when reallocating and managing existing favorites.

### Account Alerts

Enroll, view, or update your Alert preferences.

Click on **Account Alerts** to enroll or update alerts.

# Account Alerts main page

## Account Alerts

### Alert Destination for All Accounts

Email Address is required for email alerts. Mobile number is required for text alerts. When you provide a mobile number, we'll send you a text message that needs to be confirmed within 72 hours. Fraud text alerts are sent as triggered, Event and Purchase alerts are sent between 8 a.m. and 9 p.m. CT.

Email Address

Mobile Number (U.S. and Canada only)

To find out if your carrier is supported, [Contact Us](#).

Enter your email address and phone number where alerts will be sent.

Enter in the account for the alerts. Also select a Language.

### Account Selection

Account

Preferred Output Language:

# Set up Fraud Alerts

## Alert Types

**Fraud Alerts**

Event Alerts

Purchase Alerts

Enrolling into an alert prevents others from enrolling into same alert for this account.

**Alert Type**

Email

Text

Suspicious activity is detected on enrolled accounts

☐☐

Select email and or text for the type of alert you want to receive

# Set up Event Alerts

## Alert Types

Fraud Alerts

**Event Alerts**

Purchase Alerts

Select email and or text for the type of alert you want to receive.

Enrolling into an alert prevents others from enrolling into same alert for this account.

Alert Type	Email	Text
Card is activated	<input type="checkbox"/>	<input type="checkbox"/>
Card is requested	<input type="checkbox"/>	<input type="checkbox"/>
Credit limit is changed	<input type="checkbox"/>	<input type="checkbox"/>
Daily account balance	<input type="checkbox"/>	<input type="checkbox"/>
Payment is made	<input type="checkbox"/>	<input type="checkbox"/>
Personal information is changed	<input type="checkbox"/>	<input type="checkbox"/>
PIN on my card is changed	<input type="checkbox"/>	<input type="checkbox"/>

# Set up Purchase Alerts

Select email and or text for the type of alert you want to receive.

Alert Types

Fraud Alerts

Event Alerts

Purchase Alerts

Enrolling into an alert prevents others from enrolling into same alert for this account.

Alert Type	Email	Text
Purchase is declined	<input type="checkbox"/>	<input type="checkbox"/>
Purchase amount exceeds <div>\$</div>	<input type="checkbox"/>	<input type="checkbox"/>
Balance reaches or exceeds Up to three thresholds may be entered <div></div> <div></div> <div></div>	<input type="checkbox"/>	<input type="checkbox"/>
of my credit limit		
Payment is due in Maximum is 14 days before payment is due. <div></div> days	<input type="checkbox"/>	<input type="checkbox"/>

# Purchase alerts tab, part 2

Cash is withdrawn from my account	<input type="checkbox"/>	<input type="checkbox"/>
Account balance is	<input type="checkbox"/>	<input type="checkbox"/>
<div>\$</div> or more		
Available credit is	<input type="checkbox"/>	<input type="checkbox"/>
<div>\$</div> or less		
Purchase is made via mail or telephone	<input type="checkbox"/>	<input type="checkbox"/>
Purchase is made over the internet	<input type="checkbox"/>	<input type="checkbox"/>
Purchase merchant type	<input type="checkbox"/>	<input type="checkbox"/>
<div>0 Selected</div>		



# Purchase alerts tab, part 3

Purchase is made inside/outside the selected states

☐ Inside

☐ Outside

Select States (Maximum of 25 states allowed)

0 Selected

☐

☐

Purchase is made inside/outside the selected countries

☐ Inside

☐ Outside

Select Countries (Maximum of 25 countries allowed)

0 Selected

☐

☐

Purchase is made

Miles

5

from

ZIP/Postal Code

55423

☒

☐

By providing your mobile phone number, you expressly consent to receiving text messages. Canadian phone numbers will automatically receive a monthly regulatory message via SMS text if they are enrolled into any text alerts. Message and data rates may apply and you are responsible for any such charges. Please review our [Privacy Policy](#).

You must view and agree to the [Terms and Conditions](#) to submit alerts.

☐ I have read and agree to the Terms and Conditions agreement.

Review and agree to terms and conditions for text alerts

Select Submit

Cancel

Submit


Proprietary | Client training

54

View transactions

# Click Transaction Management



  
Chat With Us

  
Log Out

- Request Status Queue
- Active Work Queue
- System Administration
- Account Administration
- Transaction Management
- Account Information
- Reporting
- Data Exchange
- My Personal Information

Home

Contact Us

Training

## Welcome to Access Online

Select Transaction Management.

### Message Center

Message(s) from Access Online

### Language Selection:

American English ▾



# Access Transaction List

Approvers will see additional links on these pages if you use an approval workflow

- **Manager Approval Queue**
- **Manager Approval History**

Event Driven Notification  
Order Management  
**Transaction Management**  
• Transaction List  
Account Information  
Reporting  
My Personal Information

## Transaction Management

### Transaction List

View, review, allocate/reallocate and add comments to transaction information.

#### [View Previous Cycle](#)

Presents the Transaction list for the previous cycle.

#### [View Pending Transactions](#)

Presents the pending transactions list.

#### [View Unmatched Transactions](#)

Presents the unmatched transactions list.

Home

Contact Us

Training

Click Transaction List

# Search for the cardholder account

- Request Status Queue
- Active Work Queue
- System Administration
- Account Administration
- Event Driven Notification
- Payment Plus
- Order Management
- Transaction Management
  - Managing Acct List
  - Card Account List
  - Transaction List
  - Manager Approval Queue
  - Manager Approval History
  - Extract Administrator Queue
- Enhanced Supplier Management
- Account Information Reporting
- Data Exchange
- My Personal Information

- Home
- Email Center
- Contact Us
- Training


## Transaction Management

### Search & Select an Account

### Cardholder Account Search

Search for an account by Cardholder Account Number, Account Unique ID, Name, or Social Security Number. You can also find a cardholder account by first [Searching for a Managing Account](#).

Account Number (Last 4 digits):

Account Unique ID: 

OR

Last Name (or Vehicle Name):

OR

First Name:

Social Security Number:

OR

Search

# Select the account

Account Information

Reporting

Data Exchange


My Personal Information

Home

Email Center

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Training

Account Unique ID: 

OR

Last Name (or Vehicle Name): First Name:

OR

Social Security Number:

OR

Search

Click to select the account

Records 1 - 25 of 27

Page: 1 | 2

Product Name	Cardholder Name	Account Number	Account Unique ID	Account Status	Status Description
<u>Purchasing_</u>	MEGAN A ACKERMAN	*****4561	0142-5162-8064-8273		-Open
<u>Purchasing_</u>	LISA ALFORD	*****4579	0142-5162-8022-7126		-Open
<u>Pre-Auth Purchasing_</u>	PURCHASING WEST	*****7629	0459-6161-3620-9332		-Open
<u>Purchasing_</u>	JAMES M ARENA	*****4587	0142-5162-8017-4905		-Open
<u>Purchasing_</u>	JASON P BAINES	*****4686	0142-5162-8062-6225		-Open
<u>Purchasing_</u>	GARY L BARHORST	*****4694	0142-5162-8083-3592		-Open
<u>Purchasing_</u>	MARSHALL B BARTON	*****4555	0142-5162-8011-1157		-Open

# Transaction list screen

## Transaction Management Card Account Summary with Transaction List

Card Account Number: \*\*\*\*\*1485, KATHLEEN COFFEY

Switch Accounts

Card Account ID: 002714854004

Create

Manage

Managing Acct List

Card Acct List

» Trans List

Manager's Queue

[-] Card Account Summary

Account Number: ...1485

Outstanding Orders: \$0.00 0

Account Name: KATHLEEN COFFEY

Unmatched Transactions: \$4,675,525.53 105

Billing Cycle Close Date: 01/09/2017

Search

Print Account Activity

Total Transactions: \$1,609,108.35 32

Final Approved Transactions: \$0.00 0

Reallocated Transactions: \$219,556.00 1

% Final Approved Transactions: 0.0% 0.0%

% Reallocated Transactions: 13.2% 3.1%

Open Account

[+] Search Criteria

Return to top

[-] Transaction List

Return to top

Records 1 - 25 of 32

Page: 1 | 2

Check All Shown | Uncheck All Shown

Select	Status	Approval Status	Match	Trans Date	Posting Date	Merchant	City/State	Amount	Detail	Purchase ID	Attachment
<input type="checkbox"/>	Pending			02/22	02/26	RTD OPERATION	DENVER, CO	\$219,556.00		71485	
<input type="checkbox"/>	Pending			02/22	02/26	RTD OPERATION	DENVER, CO	\$54,918.00		71485	
<input type="checkbox"/>	Pending			02/22	02/23	RTD OPERATION	DENVER, CO	\$10,323.00		71485	
<input type="checkbox"/>	Pending			02/22	02/23	RTD OPERATION	DENVER, CO	\$35,225.18		71485	
<input type="checkbox"/>	Pending			02/22	02/23	RTD OPERATION	DENVER, CO	\$17,856.00		71485	
<input type="checkbox"/>	Pending			02/22	02/23	RTD OPERATION	DENVER, CO	\$3,900.00		71485	
<input type="checkbox"/>	Pending			02/12	02/22	MARTA - TRANSCARD UNIT	ATLANTA, GA	\$1,500.00		71485	
<input type="checkbox"/>	Pending			02/12	02/14	VPSI, INC	TROY, MI	\$66,500.00		71485	
<input type="checkbox"/>	Pending			02/13	02/14	PHX PUB TRANS-CNTRL ST	PHOENIX, AZ	\$16,728.00		71485	
<input type="checkbox"/>	Pending			02/09	02/12	LAKETRAN	TEL4403501000, OH	\$6,000.00		71485	
<input type="checkbox"/>	Pending			02/09	02/12	DART STORE	DALLAS, TX	\$83,536.67		71485	

Disputed

Matched

Exception

Reallocated

Trans Detail Level

Upload

Check All Shown | Uncheck All Shown

Records 1 - 25 of 32

Page: 1 | 2

Reallocate

Mass Reallocate

Match to Order

Approve

Pull Back





# Top section – summary and filter by billing cycle

## Transaction Management

### Card Account Summary with Transaction List

Card Account Number: \*\*\*\*\*1485, KATHLEEN COFFEY

Card Account ID: 002714854004

Switch Accounts

Create | Manage | Managing Acct List | Card Acct List | » Trans List | Manager's Queue |

[ - ] Card Account Summary

Account Number: 1485

Account Name: KATHLEEN COFFEY

Billing Cycle Close Date: 01/09/2017

Search

Print Account Activity

Outstanding Orders: \$0.00 0

Unmatched Transactions: \$4,675,525.53 105

Total Transactions:	\$1,609,108.35	32	Final Approved Transactions:	\$0.00	0
Reallocated Transactions:	\$219,556.00	1	% Final Approved Transactions:	0.0%	0.0%
% Reallocated Transactions:	13.2%	3.1%			

Open Account

# Top section – filter the list using search

Search Criteria

[Return to top](#)

Advanced Search

Transaction Amount:

All ▼ \$

Purchase ID:

Approval Status:

All ▼

Pull Back Eligibility:

▼

Order Match Status:

All ▼

Disputed Transactions:

▼

Reallocated Transactions:

▼

Display

25 ▼

Transactions per page

Search

Reset & Search with Defaults

# View the transaction list

## [+] Search Criteria

[Return to top](#)








## [-] Transaction List

[Return to top](#)

Records 1 - 8 of 8

[Check All Shown](#) | [Uncheck All Shown](#)

Select	Status	Approval Status	Match	Trans Date	Posting Date	Merchant	City/State	Amount	Detail	Purchase ID
			 							
<input type="checkbox"/>		<a href="#">Pending</a>		<a href="#">05/23</a>	05/26	GRAYBAR ELECTRIC	CLAYTON, MO	\$388.00		55132
<input type="checkbox"/>		<a href="#">Pending</a>		<a href="#">05/21</a>	05/22	UNIVERSAL RADIO INC	REYNOLDSBURG, OH	\$32.90		55132
<input type="checkbox"/>		<a href="#">Pending</a>		<a href="#">05/14</a>	05/16	DELL MARKETING L.P.	800-727-1100, TX	\$224.57		55132
<input type="checkbox"/>		<a href="#">Pending</a>		<a href="#">05/13</a>	05/15	CTI TRUCK SERVICE INC.	OKLAHOMA CITY, OK	\$255.36		55132
<input type="checkbox"/>		<a href="#">Pending</a>		<a href="#">05/13</a>	05/15	CTI TRUCK SERVICE INC.	OKLAHOMA CITY, OK	\$7,463.15		55132
<input type="checkbox"/>		<a href="#">Pending</a>		<a href="#">05/13</a>	05/15	CTI TRUCK SERVICE INC.	OKLAHOMA CITY, OK	\$2,800.00		55132
<input type="checkbox"/>		<a href="#">Pending</a>		<a href="#">05/02</a>	05/14	BEST BUY 00009746	RICHFIELD, MN	\$162.00		55132
<input type="checkbox"/>		<a href="#">Pending</a>		<a href="#">05/11</a>	05/13	DELL MARKETING L.P.	800-727-1100, TX	\$2,393.61		55132

 Disputed  Matched  Exception  Reallocated   Trans Detail Level  Upload

[Check All Shown](#) | [Uncheck All Shown](#)

Records 1 - 8 of 8

[Reallocate](#)[Mass Reallocate](#)[Match to Order](#)[Approve](#)[Pull Back](#)

# Transaction list-Attachments

<u>Attachment</u>	<u>Accounting Code</u>
	23340000000000000000 77773
	23340000000000000000 77773
	23340000000000000000 54 77773
	23340000000000000000 54 77773
	23340000000000000000 54 77773

The comments column will display an icon to indicate the presence of a comment on the transaction.

The padlock icon displays on approved and final-approved transactions.

The attachment column allows for uploading receipts electronically.

The comments column will display an icon to indicate the presence of a comment on the transaction.

The accounting code column displays the accounting code or multiple transaction is allocated to.

# View the transaction details

## [+] Search Criteria

[Return to top](#)

## [-] Transaction List

[Return to top](#)

Records 1 - 8 of 8

[Check All Shown](#) | [Uncheck All Shown](#)

Select	Status	Approval Status	Match	Trans Date	Posting Date	Merchant	City/State	Amount	Detail	Purchase ID
<input type="checkbox"/>		Pending		05/23	05/26	GRAYBAR ELECTRIC	CLAYTON, MO	\$388.00		55132
<input type="checkbox"/>	Ⓚ	Pending		05/21	05/22	UNIVERSAL RADIO INC	REYNOLDSBURG, OH	\$32.90		55132
<input type="checkbox"/>		Pending		05/14	05/16	DELL MARKETING L.P.	800-727-1100, TX	\$224.57		55132
<input type="checkbox"/>		Pending		05/13	05/15	CTI TRUCK SERVICE INC.	OKLAHOMA CITY, OK	\$255.36		55132
<input type="checkbox"/>		Pending		05/13	05/15	CTI TRUCK SERVICE INC.	OKLAHOMA CITY, OK	\$7,463.15		55132
<input type="checkbox"/>		Pending		05/13	05/15	CTI TRUCK SERVICE INC.	OKLAHOMA CITY, OK	\$2,800.00		55132
<input type="checkbox"/>		Pending		05/02	05/14	BEST BUY 00009746	RICHFIELD, MN	\$162.00		55132
<input type="checkbox"/>		Pending		05/11	05/13	DELL MARKETING L.P.	800-727-1100, TX	\$2,393.61		55132

Ⓚ Disputed Ⓜ Matched ⚠ Exception ➡ Reallocated Ⓜ, Ⓜ Trans Detail Level 📄 Upload

[Check All Shown](#) | [Uncheck All Shown](#)

Records 1 - 8 of 8

Reallocate

Mass Reallocate

Match to Order

Approve

Pull Back

View  
details,  
Dispute,  
Approve a  
transaction

Transaction Management

Transaction Detail

Card Account Number: \*\*\*\*\*5132, PAULINE WILLIAMS PRUITT

Card Account ID: 002551324043

Create | Manage | Trans List |

Transaction Summary

Status	Match	Trans Date	Posting Date	Merchant	City, State/Province	Amount	Detail	Purchase ID	Attachment	Account
		05/23	05/26	GRAYBAR ELECTRIC	CLAYTON, MO	388.00		55132		99999999

Disputed Matched Exception Reallocated Upload

Summary | Match | Allocations | User Line Items | Comments | Approval History | Client Data | Custom Fields

The Summary tab shows high-level transaction information.

The review status cannot be changed because the review day limit has been reached.  
To approve and forward the transaction, click "Approve."  
To initiate a dispute, click the "Dispute" button.

**Transaction**  
Date: 05/23/2018  
Purchase ID: 55132  
Total Amount: 388.00  
Memo Post: Yes

**Reference Information**  
Billing Cycle: Open  
Posting Date: 05/26/2018  
Reference Number: 55457375357279017625069  
Authorization Number: 031736

Sales Tax: 0.00  
Freight: 46.34

**Merchant**  
Name: GRAYBAR ELECTRIC  
City, State/Province: CLAYTON, MO  
Transaction Type: MASTERCARD MC PURCHASE  
MCC Code: 5065  
MCC Description: WHOLESALE ELEC PARTS

**Currency**  
Billing Currency: U.S. Dollar  
Source Currency: U.S. Dollar  
Source Currency Amt: 388.00

Summary | Match | Allocations | User Line Items | Comments | Approval History | Client Data | Custom Fields

Approve | Print Transaction

**Dispute**  
Dispute information only reflects the last dispute filed for this transaction. More information available in Dispute History.  

Dispute

[+] Dispute History


**Sales Draft Requests**  
• none


Click the paperclip to attach a receipt here or from the transaction list.

## Additional and ongoing resources

# Navigate to Training



  
Chat With Us

  
Log Out

- Request Status Queue
- Active Work Queue
- System Administration
- Account Administration
- Transaction Management
- Account Information
- Reporting
- Data Exchange
- My Personal Information

## Welcome to Access Online

**Message Center**  
[Message\(s\) from Access Online](#)

**Language Selection:**  

American English ▾

- Home
- Contact Us

Training

Click Training





# Review different resource types

The screenshot displays the 'Access Online' web-based training interface. On the left is a navigation menu with categories like 'Home', 'Learning topics', 'Announcements', 'All topics', 'Getting started', 'Accounts', 'Transactions and approvals', 'Orders', 'Payments', and 'Reports and statements'. The 'Learning topics' section is expanded, showing subtopics such as 'Login and passwords', 'Cardholder-initiated account setup', 'Cardholder application portal', 'Navigation', 'Mobile app', and 'Government'. The main content area shows a breadcrumb trail 'Home / Getting started / Login and passwords' and a list of resources under the heading 'Login and passwords'. These resources are categorized into 'Lessons' (Online registration), 'Quick references' (Icons, Password reset), 'Certifications' (Online registration), 'User guides' (Card activation online, Glossary, Online registration), and 'Videos' (Online registration, Password and contact information). A filter bar at the top of the main content area allows users to filter by status: 'Select all' (checked), 'Unassigned', 'Assigned', 'In Progress', and 'Completed'. There is also a 'Change role' dropdown set to 'Commercial Administrator' and an 'Apply' button. A search bar is located at the top right of the interface.

Open a topic>subtopic to find lessons, user guides, quick references, videos, and certifications.

Find a specific item or topic using the Search function.

Filter the list, if desired.

Click a resource name to open the resource, including a certification exam.

## Wrap up

Now that you have completed this session, you should be able to:

- ✓ Navigate Access Online
- ✓ View My Personal Information
- ✓ View account information and statements
- ✓ View cardholder processes
- ✓ View transactions
- ✓ Locate additional training and resources

